

INFORMATION BULLETIN

JOB TRAINING PARTNERSHIP ACT

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TO: SERVICE DELIVERY AREA ADMINISTRATORS
PRIVATE INDUSTRY COUNCIL CHAIRPERSONS
JTPD PROGRAM OPERATORS
EDD JOB SERVICE OFFICE MANAGERS
JTPD STAFF

SUBJECT: SDA ADMINISTRATORS' QUARTERLY MEETING MINUTES

The minutes and agenda from the Service Delivery Area (SDA) Administrators' Quarterly Meeting held at the Marriott Hotel in Anaheim on March 30, 1999, are attached for your review and information. Please ensure that the minutes are provided to the appropriate staff.

If you have any questions regarding the minutes, please contact Jackie Owen at (916) 654-8006.

/S/ BILL BURKE
Assistant Deputy Director

Attachments

SERVICE DELIVERY AREA (SDA) ADMINISTRATORS' QUARTERLY MEETING

Anaheim Marriott Hotel
700 West Convention Way
Anaheim, California
Tuesday, March 30, 1999

Agenda

- | | | |
|-------------------|---|---|
| 8:00 a.m. | Hot Topics | Bill Burke, Job
Training
Partnership Division |
| 8:30 a.m. | Welfare-to-Work | Bill Burke |
| | <ul style="list-style-type: none"> • Updates <ul style="list-style-type: none"> - State/Local Plans - 15 Percent Proposal Solicitation - Department of Labor Round III - Capacity Building - Program Evaluation • Coordination/Barriers/Responsibility/Actions <ul style="list-style-type: none"> - Timeframes - Reporting - Confidentiality - Eligibility Determination • Best Practices | Facilitator |
| 10:30 a.m. | Break | |
| 10:45 a.m. | Workforce Investment Act (WIA) Transition Discussion | Facilitator |
| | <ul style="list-style-type: none"> • State Workplan • WIA Designations • Performance Negotiation Process • State Workforce Investment Board • State Legislation • Mock Allocations • JTPA 2 Percent for WIA Planning • Local Workforce Investment Boards, Local Control • JTPA Closeout | |

SDA ADMINISTRATORS' QUARTERLY MEETING (CON'T)

Anaheim Marriott Hotel
700 West Convention Way
Anaheim, California
Tuesday, March 30, 1999

Agenda

Noon	Working Lunch	
1:00 p.m.	Impact of WIA Regulations	All
1:30 p.m.	Open Discussion	All
2:00 p.m.	Adjourn Meeting	

SERVICE DELIVERY AREA ADMINISTRATORS' QUARTERLY MEETING SUMMARY

Anaheim Marriott Hotel
700 West Convention Way
Anaheim, California
Tuesday, March 30, 1999

The Employment Development Department (EDD) quarterly meeting with SDA Administrators was held jointly with the quarterly meeting of the California Workforce Association (CWA), the SDA Administrators' professional organization.

Hot Topics

- One-Stop Collocation

Chuck Horel and Haven Bays, Business Operations Planning and Support Division (BOPSD), provided an update on EDD efforts to collaboratively resolve with SDAs issues of common interest relative to one-stop collocation lease/sublease state requirements. At the March 5, 1999, SDA Advisory Committee meeting, SDA Administrators suggested the formation of a work group whose charge is to identify barriers associated with the collocation of mandated one-stop entities. The SDA Administrators, or their designee, will lead the work group and will include management and technical staff from BOPSD, field office division chiefs, and JTPD. The work group will report to SDA Administrators solutions that may mitigate barriers and expedite the collocation lease process. A sign-up sheet was passed around the room.

The EDD requested and recently received lease delegation authority from the Department of General Services (DGS), Office of Real Estate Services Division. The maximum allowable was received, \$50,000, per year, per lease, not to exceed three years. The BOPSD is negotiating with DGS to amend the fixed asset cost constraint placed on the \$50,000 cap by DGS. The \$50,000 cap includes costs ordinarily associated as one-time costs, such as tenant improvement and the purchase of furniture and equipment. If successful, EDD can begin direct negotiations with one-stop partners to establish arrangements for approximately ten EDD staff.

An inquiry was made as to whether BOPSD has adequate staff resources to process projects in an expedited fashion. Chuck Horel responded that the delegation authority and recent redirection of staff will allow BOPSD to re-establish priorities.

Sue Cleere-Flores, Los Angeles City, identified budget resources and statutory or policy issues at the state level as additional barriers that may need to be resolved through legislation.

- Title III Update

Several of the SDAs deobligated 40 percent Governor's Reserve and 60 percent Discretionary funds. The deobligated funds were reallocated into areas of need throughout the state. As of January 31, 1999, the Title III expenditure rate for Program Year (PY) 1998/99 is at 36 percent, compared to 33 percent achieved last year at this time.

- Welfare-to-Work (WtW) State Update

The WtW Annual State Plan is in the clearance process. The Department of Labor (DOL) extended the submission due date to June 30, 1999. Job Training Partnership Division (JTPD) staff is incorporating comments received on the Local Plan Modification, Draft Directive WDD-4. Local plans are due to EDD by May 28, 1999. The Governor's Discretionary 15 Percent Special Project Funds Solicitation for Proposal is expected to go to print in mid-April and will be available on the JTPD web site (www.edd.cahwnet.gov/emptran.htm) shortly thereafter. The 25 percent Competitive Grant applications are due to DOL by April 30, 1999.

- Capacity Building Activities

The JTPD is collaborating with the California Department of Social Services (CDSS) to provide CalWORKs 101 training for front-line staff. Classes are scheduled for April 13, 1999, in Sacramento; April 27 in Fresno; May 4 in Orange, and May 18 in San Bernardino. The JTPD has proposed using WtW funds to provide additional Employment Training Network services and make available State Approved Local Training dollars to the SDAs. New training modules in the areas of WtW reporting and targeting special populations are being developed.

- Satellite Broadcast on Workforce Investment Act (WIA)

A national satellite broadcast sponsored by the National Association of Counties (NACo) and cosponsored by the National League of Cities is scheduled for April 29, 1999. The broadcast will serve to educate local elected officials, business leaders, private industry councils (PIC), and educators about WIA. Downlink sites are being organized locally and are invitational only.

WtW Discussion

Kathy Mailer acknowledged the challenges all partners have encountered in implementing the WtW Grant Program. During a recent Senate Budget Hearing, legislators questioned slow program implementation and low enrollments. A WtW Policy Group was formed to identify issues, develop responses, and disseminate guidance to all local partners in addressing questions and concerns about the implementation of the WtW Grant Program. The Policy Group consists of representatives from DOL, CDSS, EDD, Department of Health and Human Services (DHHS), and California Health and Human Services Agency (HHS). The WtW Policy Group and WtW Advisory Group will cross-share information, ideas, and input from their

meetings. The EDD Program Review Branch (PRB) will conduct a review of SDAs and County Welfare Departments (CWD) to learn first-hand the nature of the barriers being encountered locally. The review also will focus on the process program operators are using to achieve successful enrollments.

Suzanne Nobles, CDSS, gave an overview of the text of the draft All-County Letter providing technical guidance to CWDs and partners. The letter is expected to be released the first week of April. Highlights of the letter include sharing confidential information, program coordination, eligibility based on prior history, and re-determination of WtW grant eligibility. Gordon Scott, CDSS, WtW Regional Advisors Office, noted the coordination efforts taking place between CWDs and WtW grantees, such as joint training sessions of staff, cross-training, joint staff meetings, successful collocation of staff, electronic links, and development of confidential waiver processes.

The SDA Administrators raised the following issues:

- Not having access to client information slows down the intake process;
- Lack of referrals from CWDs;
- SDAs want on-line access to client data base information;
- CDSS needs to share ownership and responsibility of the program;
- CWDs perceive the program as theirs;
- Seek technical amendment to the state statute that will provide the needed local flexibility;
- The SDAs' need for information from CWDs is prior to referral, to help with referral;
- CWDs need assistance to identify and refer eligible clients;
- The PRB review should include clients and advocacy groups;
- The CDSS Medical Data Systems (MEDS) list provided to CWDs has erroneous client eligibility information;
- Client information is given conditionally, on a need-to-know basis;
- DOL needs to officially define subsidized and unsubsidized employment in a one-stop environment; the lack of definitions is an impediment to serving WtW and CalWORKs recipients;
- The potential for disallowed cost as a result of intermingled Temporary Assistance for Needy Families and WtW funds, leading to duplicative client services; potential repeated in WIA;
- SDAs can only provide unpaid community service or unsubsidized employment services to California Work Opportunity and Responsibility to Kids (CalWORKs) clients who have reached the 18 or 24-month time limit;
- CWDs have no automated system in place to identify clients approaching their time limit; suggestion: use WtW funds to employ a social worker case manager who will identify clients (cases) who have reached their time limit;
- CWA will look at legislative and statutory solutions to solve issues;
- What constitutes community service? DOL's interpretation of community service is that it violates fair labor standards and is, therefore, a disallowed activity; and
- High rate of "no-shows" for orientation.

Best Practices

- Successful outreach efforts achieved by stuffing welfare checks with WtW program information fliers. The DHHS identified clients on aid for 30 months or longer.
- Coordinate with the Department of Education to refer client self-referrals to WtW.
- Developing marketing strategies is a strength of SDAs and PICs and should be utilized.
- Use of MEDS file to market tax credits to employers, placing clients directly into work.
- Use WtW dollars to fund positions in the CWD and hire eligibility workers to increase referrals.

WIA Transition Discussion

Mock WIA Allocations

A handout was provided illustrating the potential effect on local area funding of omitting the hold harmless provision. The mock allocations were based on PY 1999/2000 Job Training Partnership Act (JTPA) allocations and the current SDA configuration. The mock run has no barring on final allocation figures. Using the mock comparison as a base for discussion, SDAs raised the following concerns and questions.

- A significant reduction in the Summer Youth Employment Program allocations. What, if anything, can be done?
- SDAs noted that Title III allocations were not included in the mock run and asked whether a greater shift would occur if Title III were included. The JTPD will run allocations including Title III funds. Under JTPA, Title III has no hold harmless provision.
- Additional reductions will be realized due to the 30 percent out-of-school youth provision.
- CWA will look at the possibility of sponsoring a technical amendment to address the out-of-school youth provision.
- With the mandated provision to contract out, how will SDAs operate with a ten percent administration cost?
- Clarification is needed from the state regarding cost allocating job training contract development as an administrative cost.
- Many SDAs are facing a critical decision—to continue as a Workforce Investment Board or become a one-stop operator.
- How much of the current 15 percent can be rolled into program costs?

Two Percent for WIA Planning

The JTPA Draft Directive DD-13, Use of PY 1998 JTPA Funds for WIA Transition Planning, was distributed for discussion. Vicki Grönbeck, Workforce Investment Transition Division pointed out the need for SDAs to begin involving their partners in the local planning process for the use of transition funds. Retroactive to August 7, 1998, SDAs can use up to two percent of current year formula funds for WIA transition

planning. She pointed out that the decision on how PY 1999 two percent funds will be distributed has not been made and that all options for the use of two percent funds have not been considered yet.

Examples of concerns expressed by the SDAs were:

- State recommendations are developed and forwarded without SDA participation in the decision-making process, allowing them to respond after the fact, rather than jointly crafting recommendations to benefit both systems;
- The state may be considering the option of withholding the two percent from formula allocated funds;
- Any decision to place funding outside the SDA partnership system is potentially destructive; and
- Ex post facto decision making negatively affects the implementation process.

State Job Training Coordinating Council (SJTCC) Survey Update

The purpose of the survey was to provide the SJTCC Special WIA Transition Committee with input from a wide variety of interest groups to begin formulating policy options for the Governor and Lieutenant Governor. Survey responses will be documented in a matrix format for distribution to interested parties.

WIA Transition Work Groups

In preparing for WIA implementation at the local level, CWA organized work groups for the purpose of creating a timeline of activities to prepare for the July 1, 2000, implementation date. The onset of the timeline was based on the assumption that the Governor will have appointed the State Workforce Investment Board by July 1, 1999. Ten work groups were formed of state and local representatives present at the meeting. The work group activities discussed are listed below:

- Designation of Workforce Investment Areas;
- Establish the Local Workforce Investment Board;
- Develop plan and budget for local required activities;
- Establish and/or certify the One-Stop Delivery System;
- Address local rapid response procedures and services;
- Develop procedures to designate eligible service providers;
- Promulgate local participant eligibility policy;
- Establish a local performance accountability system;
- Establish reporting and monitoring capabilities;
- Develop and/or update local automated systems to support One-Stops and service providers;
- Author the local five-year plan that responds to the state five-year plan; and
- Undertake miscellaneous transition activities.

Attachment 3 is the rough time line prepared at the meeting by assimilating each work groups' input. Attachment 4 is rough draft notes from each work groups' activity.

WORK GROUP TIMELINE

April/May 1999	<ol style="list-style-type: none"> 1. Work group: eligible providers/Intensive Training Assistance 2. Core/intensive eligibility <ul style="list-style-type: none"> - Local definitions 3. Performance management consultation papers <ul style="list-style-type: none"> - Youth, Sue Cleere-Flores - Adult, Keith Lee
June 1999	
July 1999	<ol style="list-style-type: none"> 1. State Workforce Investment Board appointed by Governor. <ul style="list-style-type: none"> - All requests already into Governor. 2. Workforce Investment Area designation done.
August 1999	
September 1999	<ol style="list-style-type: none"> 1. Operationally define goals/performance structure for the state.
October 1999	<ol style="list-style-type: none"> 1. Start writing local plan (meet with partners, etc.) 2. Rapid response system in place 3. Common understanding of definitions: <ul style="list-style-type: none"> - Services - Eligibility - Service criteria.
November 1999	
December 1999	<ol style="list-style-type: none"> 1. December 31, 1999, local plans completed. 2. Initial negotiation with the state by local levels to give state "ammo" for federal negotiations.
January 2000	<ol style="list-style-type: none"> 1. Drop-dead date for Workforce Investment Board (WIB) establishment. <ul style="list-style-type: none"> - Certified by the Governor. 2. Local plan out for review. 3. Establish performance measures and outcomes for One-Stops. 4. Decide on proportion of adult and dislocated worker funds to support One-Stop. 5. Will a WIB provide core/intensive and training services?
February 2000	<ol style="list-style-type: none"> 1. February 1, 2000, local plan submitted to the state. 2. State negotiates with Department of Labor (DOL) for state performance standards.
March 2000	<ol style="list-style-type: none"> 1. State certified service provider list in place. 2. Local areas re-negotiate with the state. <ul style="list-style-type: none"> - Local performance measures
April 2000	<ol style="list-style-type: none"> 1. State plan to DOL. 2. Select One-Stop operators and certify.
May 2000	
June 2000	<ol style="list-style-type: none"> 1. Full monitoring and reporting system in place by June 30, 2000.

WORK GROUP ACTIVITY NOTES

Designation of Workforce Investment Area

- First step: Governor to consult with two parties
 - City Local Elected Official and State Workforce Investment Board (SWIB)
- First and most important!
 - Recommendation July 31, 1999
- Locally - get some agreement to be designated
 - Make the agenda for July 31, 1999, meeting
 - Get requests in now
- Whether to develop a request form or not (to be discussed)
- Regionalism (issue)

Local Board

- In between first and second issues definition of roles and responsibilities
 - Workforce Investment Board (WIB) - youth council
- State legislation - look to number 2
 - In SB 43 - in our language
- Transition/interim WIB to be designated
 - Transitional youth council
 - Someone to close out JTPA
 - PIC within a WIB
- Roles and responsibilities - who decides?
 - Administrative
 - Fiscal agent
- WIB Advisory or 501(c)(3)
- Firewall WIB as board or both
- WIBs October 18 - January 1 drop-dead date

Develop Plan and Budget

- With October 1999 date - time crunch
- December 31, 1999, submit for comments

- Submit by February 1, 2000
- Need definition of admin
- Streamlining resources - in SB 43
- Need guidance from State regarding admin
- Need to redefine out-of-school as legislative issue
- Numbers 9 and 10 exclude regulations from public comment
- Two percent funds - need further direction from the state with input from California Workforce Association
- Need to figure out
 - Letter to the feds regarding budget numbers
 - Local WIB challenged – big problem
- Assist in identifying criteria for certification

Establish and/or Certify One-Stop

- July 2000
- Local decisions need to be in the plan five and six - part of January 1, 2000 plan
- Mid-April early May (number 4)

Local Rapid Response

October 1999 target date

1. Continue use of system need to be documented in local elected official and partner Memorandum of Understanding (MOU)
2. Local issue: continuous improvement
3. Don't need to re-establish - maybe localize instead
4. Employer/employee for evaluation performance
5. Employer team to coordinate with local teams

Concern: Some employers choose not to submit announcements

- Need to rely on local system

Procedures to Designate Eligible Service Providers

- State driven process that affects the locals
- Major issue for SWIB - needs local input
- Training course or provider to be certified?
- Concern: local WIB with control over Intensive Training Assistance (ITA) and financial accountability
- Extent One-Stop will be able to write contracts
- Local Standards: locals to provide input to the process
 - May need a regional focus
- Appeals process: what is local vs. state process
- All leads to collection of data
- Should there be a cap on ITAs?
- Should time period be extended?
- Essential to create a work group now!

Local Participant Eligibility Policy

- Concept of universality and service
- What kind of eligibility?
- What kind of reporting will be required from the Department of Labor?

4=the crux of the issue

- Local discussion! Local definition
- January 2000 bring closure to definitions: MOUs
- Recommend a work group
 - Start now - State and local
- What needs to be defined?

Local System

- 12 tasks = 3
 1. Operationally define
 2. Measurement tools
- Initial negotiations with the state by December 1999

- State with feds by February 2000: performance measures
- After process, locals negotiate with the state
 - March and April 2000
- May and June 2000: plans, monitoring, sanctioning
- Start on this right away - work group
 - Sue Cleere Flores, Youth piece
 - Keith Lee, Adult piece
- Few overall guidelines
 1. Not reinvent what seems to be working
 2. Look at what was too restrictive and loosen
 3. Minimize reporting and monitoring
- Agree with nine subpoints
 - Ninth should be annual process established by the state
- Need One-Stop monitoring with formal guidelines from the state
 - Local evaluation should weigh heavily
- What criteria from own entities and local WIB, etc.
- How the state could monitor once!
- Due date: Outline to be in plan
- Full reporting by July 2000